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## POLICIES AND PROCEDURES

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### ADVANTAGE ACCOUNTS

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The committee voted to not allow any eIndiana Consortium members to have Advantage Accounts with the exception of 2 libraries who had extenuating circumstances outside of the eIndiana Consortium.

We feel that the nature of joining a consortium means everyone wants a shared collection and we believe that taking any extra money you would like to put into the collection and putting it into a collection that only your patrons can access goes against that concept. Furthermore, we have several libraries that have dedicated a large amount of extra resources into the shared collection and in doing so every member library benefits. In 2011, we worked very hard to receive a \$63,000 LSTA grant which helped us double our holdings in the shared collection of the eIndiana Consortium.

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### CREDIT BALANCES

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Content credits paid annually to Overdrive must be spent within 14 months. Any funds that are left after 14 months (January 1st following the October renewal) will be combined and spent by a designated member of the eIndiana Overdrive Committee. These funds will be used to purchase titles with high numbers of holds and also to purchase titles that are requested by patrons.

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### CIRCULATION RULES

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In order to use the eIndiana service a user must have a library card from a participating library, which is in good standing (less than \$10 in fines). They may also need a PIN for their library card (determined by each member library).

Only residents, PLAC patrons, or patrons who have purchased a non-resident card from a participating library may use the eIndiana service. Reciprocal borrowers, students, and computer usage cards may not use the service at this time.

Each user may check out 5 titles at a time on their library card.

Loan duration is 7 or 14 days, selected by the user at the time of checkout. The item file will automatically expire at the end of their loan period. The item will be deactivated. The user should manually delete the item from their device.

Items may be renewed in the eIndiana site if there are no existing holds, and there is not a limit on how many times an item may be checked out by the same user. This includes items with Metered Access.

Each user may have 3 active holds on their card at a time.

Each user has 3 days to checkout their hold once it becomes available<sup>1</sup>.

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## COLLECTION/CONTENT RESERVE RULES & GUIDELINES

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There is not currently an eIndiana collection development policy but one might be written at a later date. We are currently using the “common sense” method of collection development.

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### SELECTORS

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**Important:** If a selector leaves your library please contact the OverDrive Liaison to have them removed from Content Reserve.

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### FORMATS

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Audiobook titles can be purchased in either WMA or MP3 formats. WMA titles are smaller files but they cannot be listened to on MAC computers and are not compatible with all portable devices. MP3 titles are larger files but are compatible with all computers and devices.

EBook titles can be purchased in either ePub or PDF formats. PDF text is a fixed size and so must be zoomed to change. ePub text can be resized and it automatically adjusts the pages for easy reading.

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### ORDERING

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Once you begin browsing the OverDrive Marketplace there are a few different ways you can see if the consortium already owns a copy of the titles and if there is significant demand for additional copies.

When viewing an individual item or items in a list, the top (bluish) bar immediately below the cover image shows the number owned by the consortium, how many are currently circulating, how many outstanding holds exist, the holds-to-owned copies ratio, and the number of copies pending in a cart. The reddish bar shows the same information for the libraries that have Advantage accounts.

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<sup>1</sup> Note: In the case of audiobooks it is recommended that if a user places a hold on an item they might want to leave a space open on their card because if they have 5 items already checked out and a hold becomes available they would not be able to check out their hold. Audiobooks may not be returned early except on mobile devices. EBooks may be returned at any time but if a patron's returns over the past seven days exceed more than three times the checkout limit, their returns will be blocked.

The consortium has chosen to allow both One Copy/One User and Metered Access titles to appear in searches by default. Selectors should be aware of this when choosing titles for their carts. Selectors may select the “Lending Model” delimiter in the search interface and click on the desired model if there is a local preference for licensing.

When any selector begins building a cart in the Content Reserve system the cart needs to be named identifiably so if anyone has a question about the cart they know who to contact. The preferred method of naming the cart is library initials, your name, and the date (i.e. ISL-Connie-20110113). Click on the gray “+Create cart” button or select “Add to a new cart” from any item record to create and name a cart.

When you log into the Marketplace it may create a cart for you automatically. If you notice that you have an empty cart in Content Reserve, please delete it. You can see all the carts by clicking on “View Carts”. This should bring up a list of all the carts for the entire consortium. To delete your empty cart simply click the box next to the list ID then click the red “Delete Cart” button at the top of the page. Only delete carts with your name attached to them. Only designated OverDrive committee members should delete old or unnecessary lists that belong to someone else.

Carts that have been locked against editing by other viewers are classified by OverDrive as “Private”. However, you should be aware that everyone can see your cart, they simply can’t edit it. Please remember to name locked carts according to the above suggestion, so questions may be addressed to the correct person and/or library.

If you build a cart, please submit that order within one month. If other members of the consortium see an item is currently pending in another cart, they might choose not to purchase that title, so please submit your orders in a timely manner. Making frequent, smaller orders is preferable for OverDrive. If a cart stays on the working list for more than one month it might be deleted by a designated OverDrive committee member.

When you submit an order in Content Reserve you have to click through several boxes to finalize the order. Exiting at any time before you see final confirmation will result in your items not being ordered. To complete an order begin by clicking on the green “Check out” button in the top right-hand corner of the Marketplace or click on the “Purchase” button in the “View Carts” interface and review the contents of your cart. Once you are happy with your selections, click on the green “Purchase Cart” button. If you do not see this tab that means your username does not have the authority (as deemed by your Director) to purchase items. The next page contains conditions that must be acknowledged to complete the purchase, including metered access terms, final acceptances, and acknowledgements. Please enter any local Purchase Order information in the box. You will only be charged for your order after you click the green “Complete purchase” button at the bottom of this page to finalize your order. Once you click submit you will see a verification page letting you know it has been submitted, and your cart will disappear.

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## RECOMMENDED PURCHASES

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The people from OverDrive often make carts for us of popular titles. These are titles that look like they are on a working list but are really just recommendations. They will be called something like “Top 100 Adult Fiction” and usually have a dark blue header.

There are also a few auto-generated reports for excessive holds, patron recommendations, and metered-access titles that have reached their maximum check out limit. These reports can be viewed by all members and titles on these reports should be given high priority when ordering.

Click on the blue “Reports” tab to see all the prebuilt reports.

Patrons may recommend up to 3 titles every 7 days.

We are set up as a 1 copy/1 user system which means once a title is checked out it cannot be checked out by another user until the lending period had expired. Metered access titles circulate the same way, but for a limited amount of time or circulations. The user may place a hold and we can view how many holds are on the title at any given time. If there are a large amount of holds another copy may be purchased by any member library<sup>2</sup>.

*Approved by the eContent Committee, October 8, 2013.*

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<sup>2</sup> Note: Our goal is to have as many titles available for our users as possible, and OverDrive makes it very easy for the selectors to see what titles are already in the system and what titles have holds during the selection process or through various reports. During the selection process or before submitting your cart please make sure to check whether we currently own the titles on your list. We can have more than one of a given title, but we do not want so many copies that once the title loses popularity we are stuck with too many copies. Our goal is a 5 (holds) to 1 (title) ratio.